What's on the menu in Downtown Stoughton?

A Study of Restaurant Supply and Demand

Prepared for and in Collaboration with:
Town of Stoughton, Office of Economic Development
Pamela McCarthy, Economic Development Director

FinePoint Associates LLC

Prepared by:
FinePoint Associates
Peg Barringer, Project Director
www.FinePointAsspociates.com

Sponsored by:
MA Dept. of Housing & Community Development
MA Downtown Initiative Program, Emmy Hahn, Coordinator

Acknowledgements

This project was only possible due to the contributions of time, information and insights on the part of many individuals and organizations. Thank you to all that participated in this project.

Pamela McCarthy, Economic Development Director,
that served as the Lead Town Staff Person and provided guidance, leadership and assistance throughout the project.

Downtown Restaurant Study Working Group, including members of the Friends of Stoughton Center, that provided valuable insights and assisted with survey promotion

Noreen O'Toole, Town Planner
Pamela Carr
Michael Connor
Leo Fay
Louis Gitto
Regina Ierardi
Forrest Lindwall
Chris Milne
Walter Parshley
Doug Prostko
Kimberley Prostko
Joseph Scardino
Maria Sousa

Town staff that assisted with survey outreach

Reggie Medeiros-Kowalczykowski, Executive Assistant
Karen MacDonald, Director Council on Aging/Youth Commission
Pat Basler, Director Stoughton Library

Restaurant Owners and Staff Members that were interviewed and provided input and information

Ali Aylurt, Owner, Chicken Kabob
Italo Araujo, Owner, Sunshine Brazilian Restaurant
Ann Azul, Owner, Stoughton Baking Company
Sam Fay, Owner, House of Brews
Mirella Micheleto, Cook & Cashier, Olivio's Grille & Pizzeria
Catherine Mui, Owner, Nagoya Sushi

All of Residents and Employees that responded to the Consumer Pattern and Preference Survey

Consultant

Peg Barringer, Partner, FinePoint Associates
www.FinePointAssociates.com

Sponsored by the MA Downtown Initiative Program

Emmy Hahn, Program Coordinator, Department of Housing and Community Development

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FinePoint Associates LLC

Part One

Project Overview

1. Project Overview

1.1 Purpose and Players

The Purpose of the project is to: explore the potential for additional restaurants in Downtown Stoughton and to support and guide restaurant recruitment efforts by assessing the inventory of existing restaurants, analyzing market conditions, and conducting primary research regarding consumer preferences.

Sponsor: MA Downtown Initiative Program

Town Department/Contact: Pam McCarthy, Economic Development Director

Consultant: Peg Barringer, FinePoint Associates

Timeframe: June – September, 2016

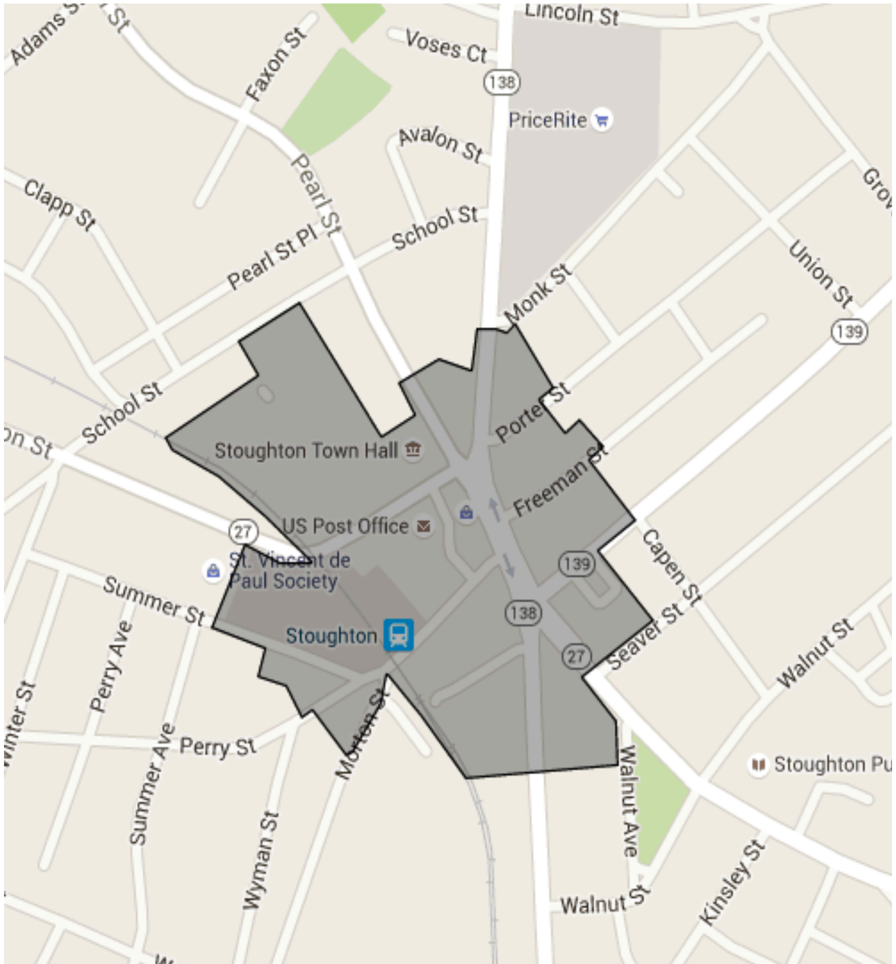
1.2 Process

The consultant performed the following tasks:

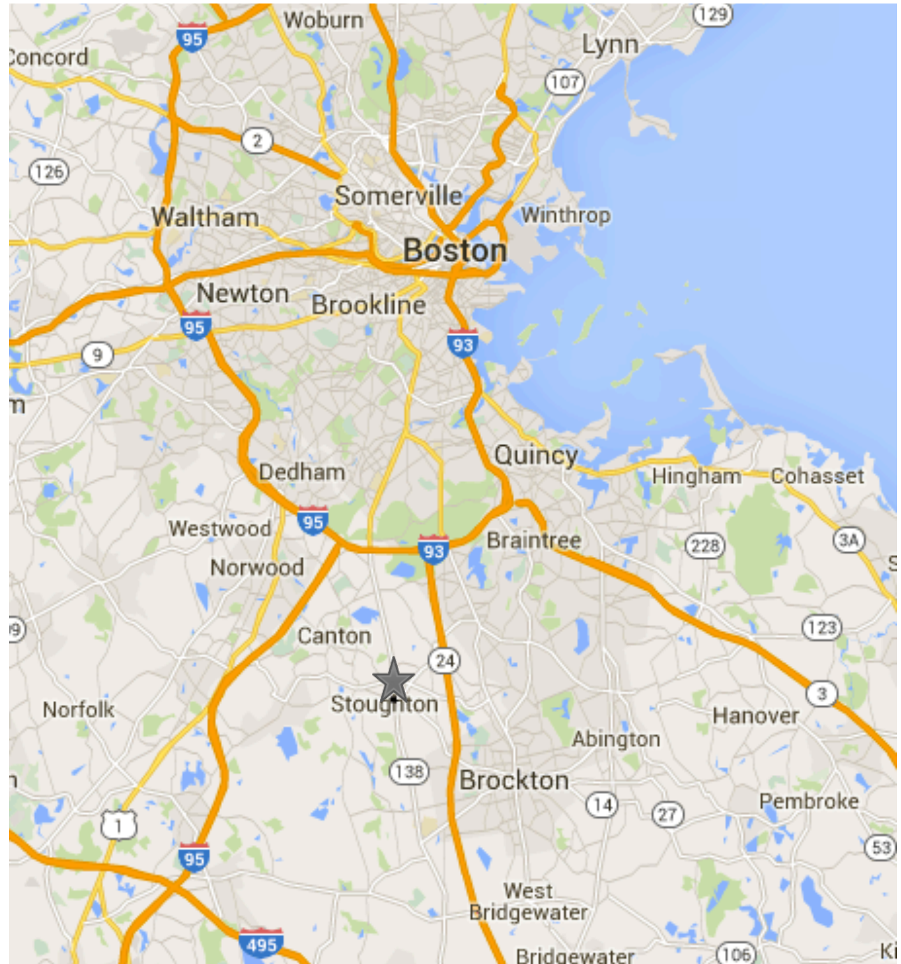
1. Inventoried and assessed supply of existing and planned restaurants in Stoughton (64 restaurants)
2. Conducted Interviews with 6 Downtown restaurant owners
3. Identified potential supporting and inhibiting factors to additional restaurant development
4. Identified relevant restaurant trends
5. Analyzed market demand, trade area restaurant expenditures, and sales leakage
6. Designed consumer pattern and preference survey and analyzed results (640 responses)
7. Summarized findings that could be used in restaurant recruitment and developed value proposition

1. Project Overview

1.3 Identification of the Study Area



Downtown Business District Target Area



In Regional Context

Part Two

Assessment of Existing Restaurant Supply & Relevant Downtown Factors

2.1 Stoughton Restaurants

2.1.1 Location and Ownership

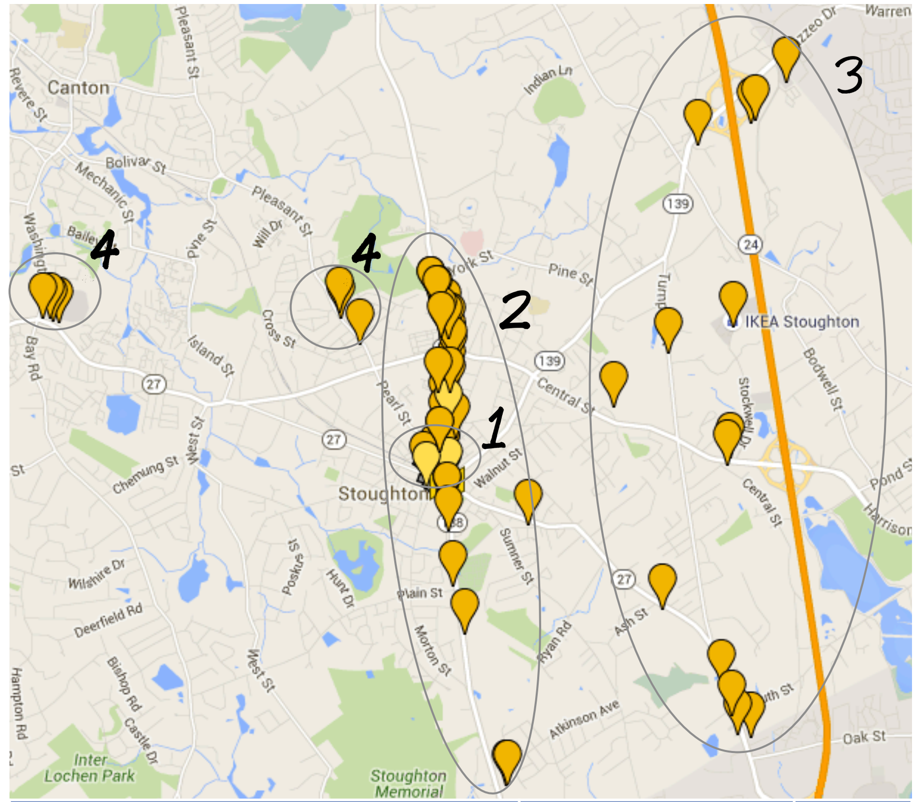
Our inventory revealed approximately 64 restaurants located in Stoughton including 3 planned restaurants that are expected to open within the next 3-4 months. The full inventory is presented in Appendix A.

The restaurants in Stoughton are clustered in a few areas as shown on the map to the right:

1. Downtown Target Area
2. Along Rt. 138, outside of the Downtown Target Area
3. Near Rt. 24 (e.g., on Rt. 139, Rt. 27, Technology Drive)
4. Other Areas (Pearl Street, Rt. 27 near The Village Shoppes in Canton)

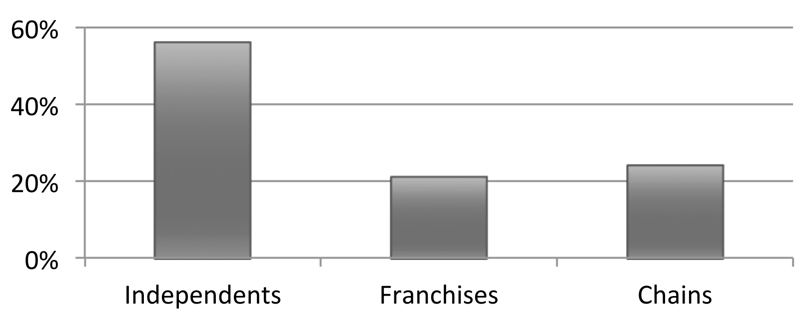
The majority of the restaurants (56%) are single-location independent businesses, 21% are franchises, and the rest are local, regional and national chains (9%, 4%, and 11% respectively).

Existing Restaurant   Planned/Coming Restaurant



Area		# of Restaurants	%
1	Downtown Target Area	9	14%
2	Rt. 138, outside of Downtown	33	52%
3	Near Rt. 24	14	22%
4	Other Areas	8	13%
	Total	**51**	100%

Ownership Type

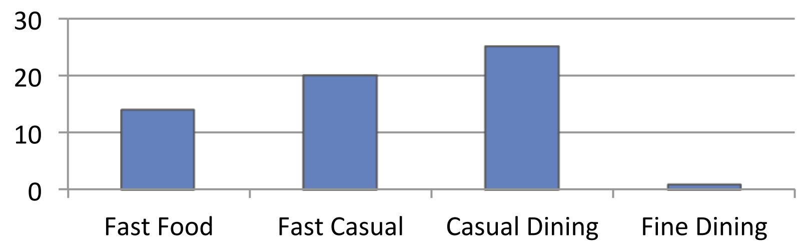


2.1 Stoughton Restaurants

2.1.2 Restaurant Types

A little over one-half of the restaurants in Stoughton fall into the category of Fast Food or Fast Casual restaurants. The other half is comprised almost entirely of Casual Dining establishments. There is only one restaurant (Amelia's) that would be considered a fine dining restaurant.

Restaurants by Category



Restaurant Category Descriptions

Fast Food restaurants also known as quick-service restaurants, emphasize speed of service. Examples inlcude McDonald's and Burger King.

Fast Casual restaurants typically do not offer table service but the quality of the food and the environment along with the prices tend to be at a higher level than typical fast food establishments (e.g., Panera Bread, Chipotle).

Casual Dining restaurants serve moderately-priced food in a casual atmosphere, typically with table service and often with alcohol available. Examples include TGI Friday's, Olive Garden and Applebees.

Fine Dining restaurants often have specific dedicated meal courses, higher-quality décor and highly trained wait staff. Food portions are smaller and visually appealing. Fine dining restaurants are generally either single-location operations or have just a few locations.

40% are "full-service restaurants" with table service, 52% are "limited service restaurants", where customers order and/or pay at a counter and 8% are "Snack and Beverage Bars" including businesses such as coffee, donut and ice cream shops.

The restaurants range in concept and ethnic flair.

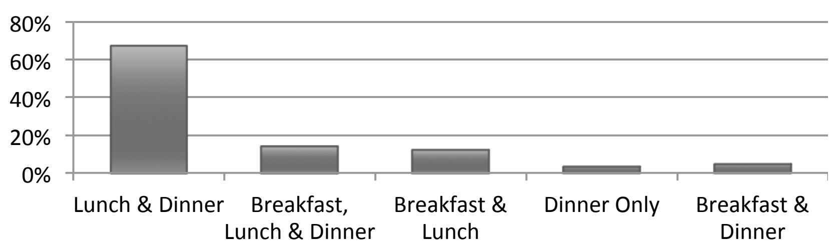
Restaurant Concept/Ethnic	# of Restaurants
Pizza/Subs	12
Asian	10
Café, Sandwich, Soup, Salad, Breakfast	9
Fast Food Burger, Chicken, Taco	8
Italian	5
Coffee Shop, Donut, Bagel, Muffin	4
American Casual/Grill	3
Other	3
Brazilian	2
Mexican	2
Pub/Sports Bar	2
Caribbean/West Indian	1
Ice Cream/Yogurt Shop	1
Middle Eastern (Greek, Turkish, etc.)	1

Some restaurant concepts not represented include: brew pub, bistro-upscale, fish/seafood, healthy/veggie-centric/organic (although there is a healthy Thai restaurant), Indian and locally sourced food.

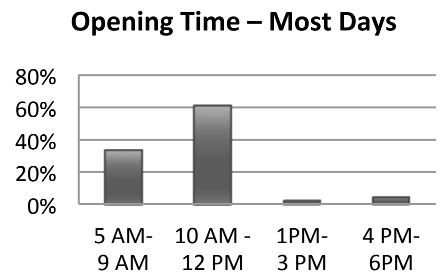
2.1.3 Restaurant Characteristics

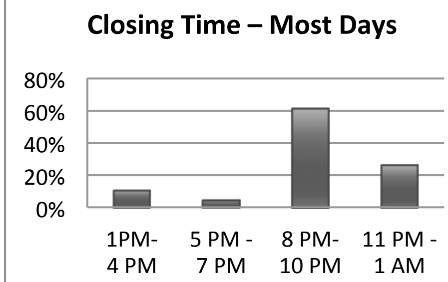
- Two-thirds of the restaurants serve lunch and dinner, while 12% serve only breakfast and lunch and another 14% serve all three meals. Two restaurants, including the House of Brews in Downtown Stoughton, serve breakfast and dinner, and are closed in the middle of the day.
- Operating hours vary widely among Stoughton restaurants. Many restaurants have different hours for each day of the week and some vary their hours by season.
- Approximately 36% of the restaurants serve alcohol. Of those, the vast majority have a full liquor license; only a few serve only wine and beer.
- We found 3 restaurants that provide some type of entertainment, including live music (at one restaurant) and trivia/bar games or karaoke(at 3 restaurants.)
- We found at least 14 restaurants that offer online ordering and at least 10 that provide delivery service.

Meals Served

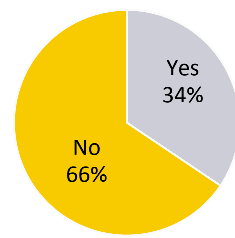


Hours

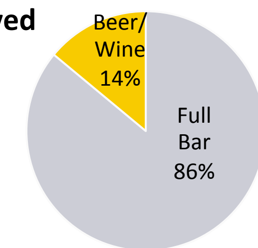




Serve Alcohol

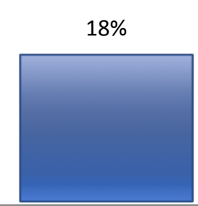


Alcohol Served



Online Ordering

Delivery



2.2 Restaurant Development in Downtown

2.2.1 Downtown Restaurant Concepts and Characteristics

There are seven restaurants currently operating in the Downtown Target Area. All but one (Olivio's) are single-location independent restaurants. Three are full service casual dining establishments and the others fall more into the category of fast casual. Two of the existing restaurants serve alcohol. Two new restaurants are expected to open soon – a Mexican fajitas/burritos restaurant that will serve alcohol and a family style Italian restaurant. The restaurant concepts represented are described below.

	Restaurant	Restaurant Concept	Description	Meals Served	Alcohol Served	Entertainment	Yrs. in Business
EXISTING	Nagoya Sushi	Asian - Sushi	Sit-down full service sushi restaurant that also serves salads, tempura and Asian entrées. Serves alcohol.	L, D	Yes	No	2
EXISTING	Kyoto	Asian - Chinese	Casual Chinese that offers delivery	L, D	No	No	NA
EXISTING	House of Brews	Café, Coffee House	Coffeehouse and tavern with outdoor patio offering craft beer & specialty cocktails, breakfast acai bowls, burgers, salads, wraps, live music, open mic and game nights. Open mornings and evenings.	B, D	Yes	Yes	3
EXISTING	Olivio's Grille & Pizzeria	Pizza/Subs	Specializing in 24 flavors of wings, pizza, subs, salads and seafood dinners	L, D	No	No	8
EXISTING	Sunshine Brazilian Restaurant	Brazilian	specializing in Brazilian appetizers, entrees, sandwiches, salads, burgers (bi-lingual menu)	L, D	No	No	4
EXISTING	Stoughton Baking Company	Portuguese Bakery/Café	Portuguese style bakery, coffee, breakfast and lunch spot, pastries, soup, and sandwiches	B, L	No	No	7
EXISTING	Chicken Kabob	Middle Eastern (Turkish)	Popular Turkish fast casual lunch and dinner spot serving lamb/chicken kabobs, falafel, gyro, salads, etc.	L, D	No	No	4
PLANNED	Avocados Mexican Taquerias	Mexican	Mexican fajitas, burritos, etc. Owners have another restaurant in Whitman (that is limited service).	L, D	Yes	No	0
PLANNED	Nicole's	Italian	Family style Italian restaurant.	L, D	?	No	0

*In addition to restaurants, there are also a few Social Clubs that occasionally serve dinners.

2.2 Restaurant Development in Downtown

2.2.2 Factors Relevant to Downtown Restaurant Development

The following represent findings through observation and from interviews with representatives of 6 downtown restaurants.

<u>**Potentially Supporting Factors**</u>

- **Restaurants in downtown are on the rise.** At least 4 new restaurants have opened in downtown in the last 5 years and 2 will be opening soon showing that restaurateurs have confidence in the location. All of the business owners that were interviewed reported at least slow or slight growth over the last 3 years.

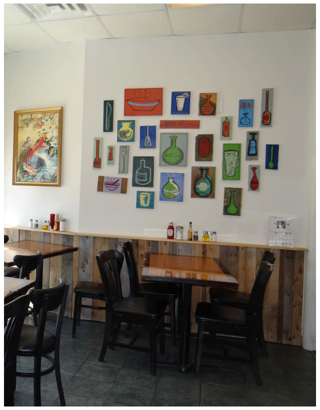
- **The commuter train brings many potential customers into downtown; over 1,000 people board the train at Stoughton on a typical weekday.** Several businesses cited the train station as a major locational advantage.

- **If redeveloped, the State Theatre could be a tremendous asset for Downtown and potential impetus for additional restaurant growth.** The Friends of State Theatre are currently raising funds to renovate the 12,000 square foot historic vaudeville theater for a multicultural arts center with performances and education programming.

- **The cost of occupancy (rent) is less than many other business locations and landlords will accept startup businesses.** One business owner stated that before settling in Stoughton, she looked for locations in the Boston neighborhoods of Allston and Brighton and found much higher costs and restrictive leasing requirements.

- **There is some indication that there is demand for more upscale offerings.** The House of Brews has found, in spite of some some popular opinion to the contrary, there is indeed, a demand for craft beer and organic coffees.

- **Recent and planned housing development is increasing the number of residents in downtown.**



2.2 Restaurant Development in Downtown

2.2.2 Factors Relevant to Downtown Restaurant Development (cont'd)

<u>**Potentially Inhibiting Factors**</u>

- **Restaurants are scattered (not clustered) which inhibits the perception of downtown as a dining destination.** Except for Olivio's and Chicken Kabob, the consumer cannot see more than one restaurant together in any section of the downtown. The new Mexican restaurant that will be located across from Nagoya Sushi is a step in the right direction to help provide an image of depth in restaurant offerings.

- **The traffic pattern is confusing for potential customers and reduces access.** Several restaurant representatives indicated that the traffic pattern in Downtown inhibits customer attraction and two business owners reported incidences of customers not being able to find their way.

- **Need for more Foot Traffic and Businesses.** Several business owners commented on the need for more businesses and uses that would encourage more walking traffic in downtown.

- **Vacancies, boarded properties and uses that do not generate walk-in trade create dead spots** and contribute to an atmosphere that appears dormant and not open for business.

- **Commuters using the train station are not presented with visual cues or information** that might draw them into the downtown or make them aware of restaurant offering.

- **Stoughton has an abundance of restaurants.** Stoughton has more restaurants per capita than MA. To successfully compete, new restaurants may need to provide unique offerings, higher quality or value and/or draw customers from beyond Stoughton.

Part Three

Restaurant Industry Trends & Market Demand Analysis

3.1 Restaurant Industry Trends

3.1.1 Restaurant Industry Trends

Sales and Consumer Spending

- Consumers spend just about as much on food away from home as they do for groceries. In fact, according to the Department of Commerce Data, in 2015, spending at restaurants overtook spending levels at grocery stores.

- Overall, restaurant sales are up 6% over the last year. Household consumption is growing and consumer spending has shifted more toward experiential spending and rather than traditional retail, which should positively impact restaurants. But, even with the improving economy, restaurants will have to vie for their share of disposable income and find creative ways to drive traffic and build guest loyalty in this competitive arena.

Consumer Preferences

- Growing demand for healthier organic and veggie- centric menu items, minimally processed and natural ingredients.

- Continued and growing concern for where food products originate, with a preference for locally sourced meats, seafood and produce.

- Demand for ethnic and international cuisines is expected to continue as community demographics shift and adventurous diners seek new experiences, including an interest in ethnic condiments and spices.

- Millennials (age 19 – 35) are heavy restaurant users, as they view dining out as a social event and as a necessity not a luxury. The National Restaurant Association suggests they tend to favor fast casual dining and their interest in new things draws them to more ethnic restaurants. The ability of restaurants to attract younger diners will be important.

Competition and Reaching Customers

- Very competitive environment with many operators exploring new concepts to keep up with changing tastes.

- Guest engagement extends from before the guest enters the restaurant to beyond their departure. Social media and mobile apps help consumers, especially younger segments, to research options, make informed decisions, and share their experiences afterward. Operators who successfully use social media to connect with consumers will have a greater chance of success.

Rent Costs

- Rising real estate costs in prime locations will continue to pose challenges in the highly competitive environment, potentially giving way for restaurants looking to expand to seek less expensive locations for new outlets.

Sources: Dept. of Commerce. U.S. Census, RSM US, LLC, National Restaurant Association

3.2 Market Demand Analysis

3.2.1 Overview of Market Segments and Sub-Segments

Restaurants located in the Downtown Stoughton have the opportunity to serve several potential market segments:

- Resident Market Segment
- Downtown Workers
- Commuter Train Users

Resident Market Segment

Trade Area 1: Over 33,700 residents live within a 5-minute drive time of Downtown Stoughton (the likely potential primary trade area for new restaurants located in Downtown, although this will vary by restaurant type). The median household income in this area is $80,536; 16% higher than Massachusetts. These residents spend close to $64 million per year at eating and drinking places.

Sub-Segment: Residents within Walking Distance of Downtown -- Residents living in very close proximity to downtown comprise an important sub-segment. This is a growing market as many new housing units have been recently developed and many more are planned. Over 100 units will be developed in the next 1-2 years. The new residents are expected to be predominantly young professionals (i.e., millennials), mostly pre-nesters, that use the train to commute to Boston. Given these characteristics, they would likely be heavy restaurant users.

Trade Area 2**:** Depending on the uniqueness of the offerings, there may be potential for downtown restaurants to draw a small portion of customers from a further trade area. Over 126,000 residents live within a 10-minute drive time from Downtown.

More demographic and consumer characteristic data pertaining to trade area residents is provided in later sections of this report.

Downtown Workers

This segment includes the employees and business owners that populate downtown on a daily basis and present a market opportunity for meal and snack purchases before, during or after work hours.

- Over 300 Town employees that work in or very near the downtown (e.g., town hall, school, police, fire)
- Many small business owners and employees located at Trackside Plaza and throughout the Downtown
- Employees and lawyers working at the Court House.

Commuter Train Users

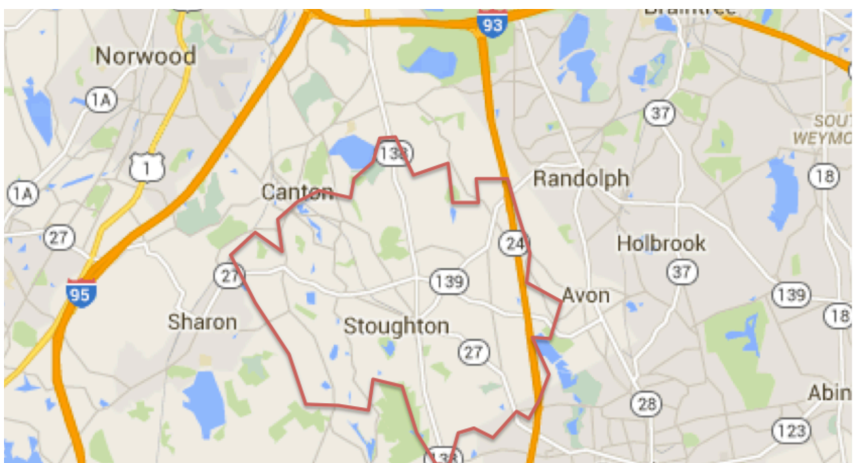
Slightly over 1,000 commuters use the Downtown Stoughton Train Stop on a typical weekday (according to the 2014 MBTA Ridership and Service Statistics). These train riders might be enticed to purchase coffee/breakfast in the morning, drinks or dinner after work, or prepared meals to take home. In addition, some commuters are dropped off and picked up by other parties that could present additional market opportunities.

In the future, if the State Theater is redeveloped and programmed as proposed, the attendees and program participants would constitute an additional potential market segment for Downtown restaurants.

3.2 Market Demand Analysis

3.2.2 Trade Area Description (Resident Market Segment)

The primary trade area refers to the geographic area from which a retail entity generates most of its sales (60-80%). Trade areas for restaurants vary greatly by the type, size and uniqueness of the offering. After obtaining input regarding consumers patterns from local restaurant owners and discussing circulation routes, competition and other factors with the Downtown Restaurant Study Working Group, it was determined that the likely potential primary trade area for new restaurants in Downtown is approximately a 5-minute drive time. Although, again, this will vary by restaurant type, quality and uniqueness. The 5-minute drive time extends slightly beyond the Stoughton town boundary. From Downtown, the area extends approximately 2 miles to east and west and 2 to 3 miles to north and south. *(This is a computer-generated drive time; actual drive times will vary with traffic conditions.)*



5-Minute Drive Time – Primary Trade Area

There are approximately 33,725 people living within the primary trade area. The population is predominantly above average income. The 2015 median household income is 19% higher than the state-wide median and 40% of the households earn over $100,000 per year. The population is 77% White, 12% Black/African American, 5% Asian, and 6% more than one or other races. Less than 4% of the population is Hispanic compared to 11% in the State. According to the available Census data, the largest cultural concentrations are Irish, Italian and Portuguese.

Compared to Massachusetts overall, the primary trade area population, on average, is older, more likely to be married, and own their home and a car, with about the same likelihood of having children under 18 in the household. The median age of 43.7 is about 10% higher than Massachusetts and 15% higher than the U.S. The population is comprised predominantly of family households (68%), defined as more than one person in the related by blood or marriage. About 27% of the households contain only one person, just slightly less than the state average of 29%. Homeownership is 16% higher than in the state.

Projected Growth - According to projections obtained from Nielsen, between 2010 and 2020, the population is expected to grow annually by approximately .86% and the number of households by .96%, while the statewide projections are .67% and .74%. Projections are based on data from the American Community Survey, the United States Post Office, new construction data, and the Nielsen Master Address File.

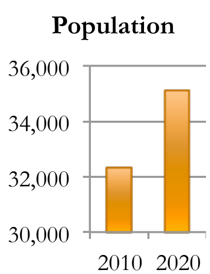
** Data items in this section are 2015 estimates, unless otherwise noted.*
Sources: Nielsen Company, U.S. Census, InfoUSA, American Community Survey, Social Explorer, www.FinePointAssociates.com

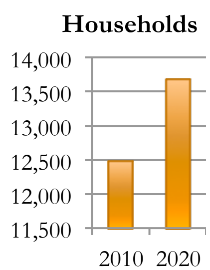
3.2 Market Demand Analysis

3.2.3 Trade Area Resident Characteristics

Primary Trade Area (TA1) = 5-Minute Drive Time

2015 Population	2015 Households	2015 Household Income Median	2015 Household Income Average
33,725	13,112	$80,536	$99,760





GROWING MARKET

During 2010-2020, the population is expected to grow by 9% and the number of households by 10%, higher than the state-wide projection of close to 7% for both.

Source: Nielsen Company

Residents spend **64 million** per year at restaurants

Median age is **43.7**; 39.7 statewide and 37.9 in U.S.

32% of households contain children; 31% in MA, 33% in U.S.

44% TA1 residents have Associates Degree or higher; 47% in MA, 37% in U.S.

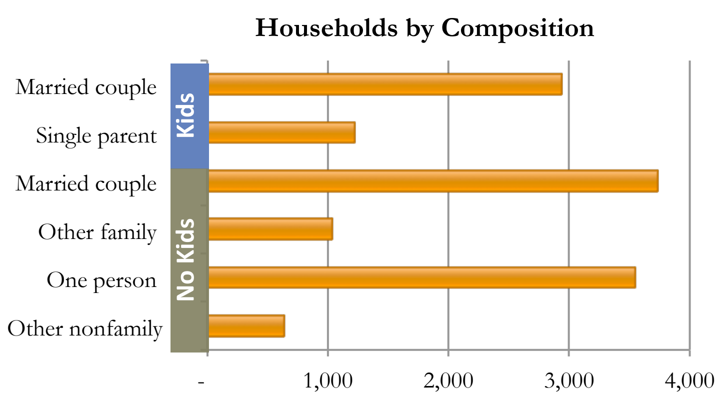
72% Homeowners; 62% in MA

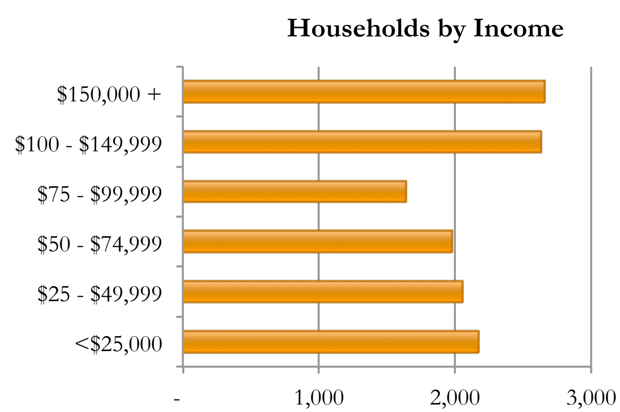
Race & Ethnicity	TA1	MA
White Alone	77%	79%
Black/African American	12%	7%
Asian	5%	6%
Other/More than 1 Race	6%	8%
Latino/Hispanic	4%	11%

20% of TA1 residents speak a language besides English at home

Asian/Pacific Island Language: 2 %, Indo/European Language: 14%, Spanish: 2 %, Other: 1%

Cultural Concentration	TA1	US
Irish	20%	7%
Italian	11%	4%
Portuguese	6%	<1%
Latino/Hispanic	4%	18%





6,918 households have income > $75,000; Median household income is $80,536, 19% higher than MA

FinePoint Associates LLC

** Data items in this section are 2015 estimates, unless otherwise noted.*
Sources: Nielsen Company, U.S. Census, InfoUSA, American Community Survey, Social Explorer, www.FinePointAssociates.com

3.2 Market Demand Analysis

3.2.4 Trade Area Restaurant Expenditures

Given the demographic, lifestyle and other consumer characteristics of the population their total annual expenditures can be estimated. Residents living within the 5-minute drive time trade area spend approximately $64 million per year at eating & drinking places. The residents living within a 3-minute drive time from Downtown account for close to $33 million of these expenditures. The annual restaurant expenditures for residents living within a 10-minute drive time total close to $228 million.

Note: These are the expenditures currently being made by residents at a variety of establishments which could include locations both inside and outside of the areas where they live.

Annual Expenditures by Residents of the Area		Primary Trade Area	
	3-Minute Drive Time Population = 17,895	5-Minute Drive Time Population = 33,725	10-Minute Drive Time Population = 126,654
Total Eating & Drinking Places	**$32,562,042**	**$63,827,956**	**$227,814,947**
Full-Service Restaurants	$16,558,721	$32,505,776	$116,045,012
Limited-Service Eating Places	$14,526,819	$28,413,340	$101,274,912
Drinking Places	$1,476,501	$2,908,841	$10,495,024

The estimates for full service restaurants, limited service restaurants and bars are provided in the table. However, it should be noted that the distinctions between categories are not always consistently applied. Definitions are provided below.

Definitions

Full Service Restaurant: This industry group comprises establishments primarily engaged in providing food services to patrons who order and are served while seated (i.e., waiter/ waitress service) and pay after eating. Establishments that provide these types of food services to patrons with any combination of other services, such as takeout services, are classified in this industry.

Limited Service Restaurants: This industry group comprises establishments primarily engaged in providing food services where patrons generally order or select items and pay before eating. Most establishments do not have waiter/waitress service, but some provide limited service, such as cooking to order (i.e., per special request), bringing food to seated customers, or providing off-site delivery.

Drinking Places: This industry group comprises establishments primarily engaged in preparing and serving alcoholic beverages for immediate consumption.

3.2 Market Demand Analysis

3.2.5 Restaurant Sales Leakage Analysis

A leakage analysis compares annual expenditures made by the residents in an area with the annual sales of the establishments located in that area.

- **Sales Leakage (Gap)** -- Categories with high sales leakage may suggest opportunity for local businesses (existing and/or new businesses) because this indicates that residents are currently going outside the area to make purchases. However, it is not expected that residents will do all of their purchasing locally, people will always make some amount of restaurant purchases near where they work or while travelling.

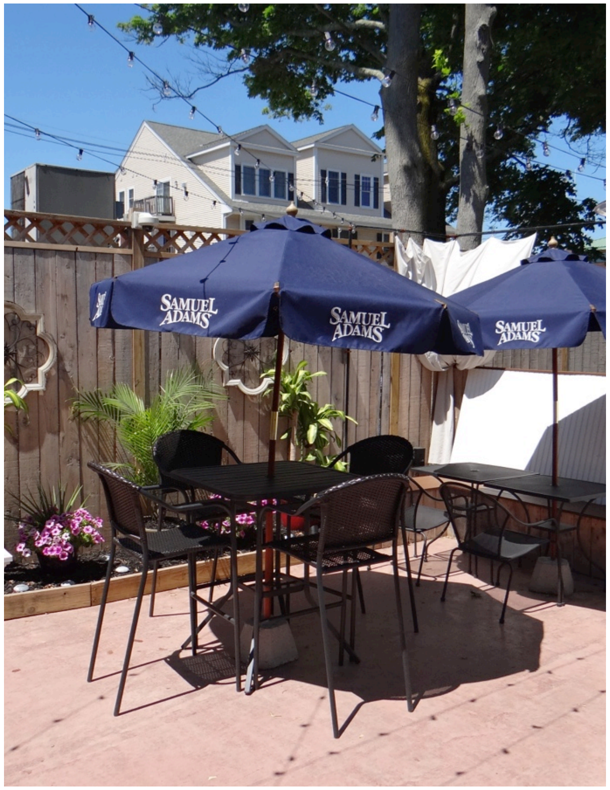
- **Negative Sales Leakage (Surplus)** -- Categories with negative sales leakage indicate that the businesses are currently meeting more than just local demand. In this case, the businesses are likely generating sales from customers that live outside of the area and/or may be serving non-resident market segments such as employees or visitors. In categories showing little or no leakage, it does not necessarily mean that there is no opportunity. There might be opportunity depending on the ability of local businesses to draw from beyond the trade area, overtake trade from existing competition by offering more desirable products and services, and/or attract expenditures from non-resident market segments.

Stoughton has an abundance of restaurants and there appears to be limited sales leakage, especially in the full service restaurant category. As noted, this does not necessarily mean that there are no opportunities for new restaurants but it does indicate a highly competitive environment and clearly, proximity to the customer base is not sufficient to secure a market share. Success of new restaurants will be very dependent on uniqueness, quality and value of the offering as well as ability to capture non-resident market segments.

In the 5-minute drive time area, the area considered to be the primary trade area for new downtown restaurants, there is around a $6 million surplus in the full service restaurant category and about the same amount of unmet demand in the limited service category. These figures should be considered with the following caveats.

- The surplus in the full service restaurant category may be over estimated due to several restaurants situated near Route 24 that cater to a more regional than local market.
- The unmet demand in the Limited Service category may not be very significant because residents will likely continue to do a certain portion of of their purchasing in this category near their workplace.

Sales Leakage Analysis		Primary Trade Area	
	3-Minute Drive Time	5-Minute Drive Time	10-Minute Drive Time
Total Eating & Drinking Places	-$8,257,951	$1,619,394	$14,347,713
Full-Service Restaurants	-$6,936,578	-$6,145,975	-$2,593,243
Limited-Service Eating Places	-$1,670,253	$6,001,034	$14,445,074
Drinking Places	$348,881	$1,764,335	$2,495,882



Part Four

Restaurant Consumer Pattern and Preference Survey

4.1 Survey Overview and Market Segments Analyzed

4.1.1 Survey Overview

A restaurant consumer pattern and preference survey was conducted during July and August, 2016. It was administered both electronically via the Internet and also in hard copy format. The survey was promoted by the Stoughton Office of Economic Development and the Friends of Stoughton Center through the Town website, e-mail lists, facebook pages, posters, flyers, downtown businesses, community institutions, and other outlets.

We received 640 survey responses that were used to analyze consumer behavior and preferences for several market segments and sub-segments as described below.

4.1.2 Market Segments Analyzed

Market Segment 1: Stoughton Residents
The primary trade area for Downtown Stoughton restaurants was identified as a 5-minute drive time area (computer-generated) which includes the Town of Stoughton and parts of bordering communities. For our survey analysis, we have only included responses from Stoughton residents, the largest portion of the primary trade area. This is because the survey was promoted primarily to Stoughton residents and although we did receive some responses from residents of bordering communities, the number was relatively small and many of these respondents were downtown employees and therefore not entirely representative of the general population of bordering communities.

Stoughton Resident Sub-Segments

- **Residents within Walking Distance**. Given that these residents live within close proximity to Downtown Stoughton, they comprise an important sub-segment.
- **Millennials (residents age 18-34**). Traditionally, this young market segment are heavy restaurant users.
- **Newer Residents (≤6 yrs).** The trade area population is growing and therefore it is useful to examine the preferences of the new incoming sub-segment.
- **Households with Income >$75,000.** The median household income of the primary trade area population is $80,536 and households with incomes over $75,000 are heavier restaurant users. Consequently, this segment merits a closer look.

Market Segment 2: Downtown Area Employees
Downtown employees include the over 300 Town employees (town hall, school, police, fire departments), many small business owners and employees at Trackside Plaza and throughout the Downtown, and employees and lawyers working at the Stoughton District Court. This segment represents possible opportunity for food purchases before, during and after work.

Market Segment 3: Commuter Train Users
The Stoughton Train Stop is used by slightly over 1,000 commuters on a typical weekday which might represent a potential market for coffee/breakfast on the way into work and dinner/drinks or to take-out food on the way home.

4.1 Survey Overview and Market Segments Analyzed

4.1.3 Survey Response Counts

Survey Response Counts	
	#
Market Segment 1: Stoughton Residents	**606**
▪ Within Walking Distance of Downtown	344
▪ Millennials (residents age 18-24)	140
▪ Newer Residents (≤6 yrs)	137
▪ Households with Income >$75,000	388
Market Segment 2: Downtown Area Employees	**95**
Market Segment 3: Commuter Train Users	**93**
Total Number of Surveys (some responses used in more than one category)	**640**

4.2 Stoughton Residents and Sub-Segments

4.2.1 Restaurant Usage and Consumer Behavior

Stoughton residents eat out an average of 5.4 total times per week, 3.2 times per week without counting breakfast/coffee. According to a 2016 Zagat Survey, Boston residents eat out an average of 3.8 times per week (not counting breakfast). The *millennial sub-segment* eats out more frequently, 5.9 times per week.

Survey results appear to point to an unmet market demand. 43% of Stoughton residents said they currently do less than 25% of their total restaurant spending in Stoughton. The percentage of restaurant spending done in Stoughton is fairly consistent among all sub-segments. 72% of Stoughton residents do less than 50% of their total restaurant spending in Stoughton.

Frequency of Meals Purchased at Restaurants

(Avg. times per Week)

	Stoughton Residents	Wi Walking Distance	Millennials (age 18-34)	Newer Residents ≤6 yrs.	HH Income ≥$75,000
Breakfast/ Coffee	2.17	2.11	2.46	2.27	2.11
Lunch	1.54	1.47	1.72	1.54	1.47
Dinner	1.66	1.69	1.74	1.68	1.70
Total	5.37	5.26	5.91	5.49	5.28
Total Lunch & Dinner Only	3.20	3.16	3.45	3.21	3.17

% of Restaurant Spending done in Stoughton

	Stoughton Residents	Wi Walking Distance	Millennials (age 18-34)	Newer Residents ≤6 yrs.	HH Income ≥$75,000
25% or Less	43%	41%	41%	45%	44%
26 - 50%	29%	29%	32%	27%	32%
51 - 74%	18%	20%	21%	18%	17%
75% - 100%	10%	11%	6%	10%	8%

4.2 Stoughton Residents and Sub-Segments

4.2.1 Restaurant Usage and Consumer Behavior (cont'd)

One-quarter of Stoughton residents (25%) eat dinner at a quick service restaurant once per week or more and 39% eat dinner at a quick service restaurant 2-3 times per month or more.

Fast casual restaurants are more popular than quick service restaurants. 26% of Stoughton residents eat dinner at a fast casual restaurant once per week or more and one-half (50%) eat dinner at a fast casual restaurant 2-3 times per month or more. The *millennial* and *newer resident* segments patronize fast casual restaurants slightly more frequently than other segments.

Close to one-third of Stoughton residents (32%) eat at a casual dining establishment once per week or more while a full 60% of residents eat at a casual dining establishment 2-3 times per month or more.

Close to one-third of Stoughton residents (31%) go to a fine dining establishment 2-3 times per month or more. **More than one-half (54%) of Stoughton residents go to a fine dining establishment once per month or more.** If we apply these rates to the trade area adult population, it translates into 3,300 – 4,800 meals per week at at restaurant with entrée over $18. There is only one restaurant, Amelia's , within the Town of Stoughton that falls into this category.

Frequency of DINNER Meals Purchased at Various Restaurant Types - Stoughton Residents

	≥ 2 Times/ Week	Once/ Week	2-3 Times/ Month	Once/ Month	< Once/ Month
Quick Service (typically <$7 per person, Comparable to McDonald's, Wendy's, Starbucks, etc.)	11%	14%	14%	14%	46%
Fast Casual (typically $7 - $10 per person, Comparable to Panera Bread, Chipotle, Five Guys, etc.)	10%	16%	24%	21%	28%
Casual Dining (typically $10 - $18 per person, Comparable to Olive Garden, Chili's, Outback Steakhouse, etc.)	9%	23%	28%	19%	21%
Fine Dining (entrees>$18, Comparable to Legal Seafood, Amelia's, etc.)	4%	10%	17%	24%	46%

4.2 Stoughton Residents and Sub-Segments

4.2.1 Restaurant Usage and Consumer Behavior (cont'd)

The House of Brews is the most frequently visited establishment among survey respondents. 71% of respondents visited the House of Brews in the last 3 months. Frequency was highest among the *income over $75,000* segment.

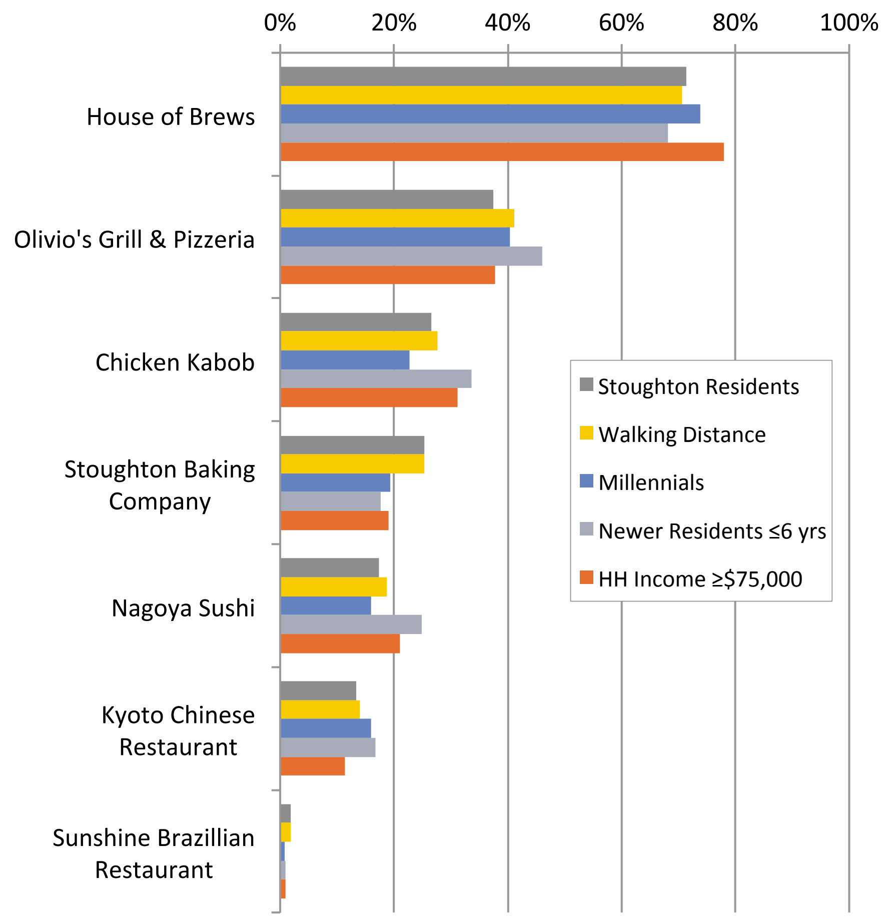
38% of respondents visited the Olivio's Grill & Pizzeria in the last 3 months. Frequency was highest among the *newer resident* segment.

27% of respondents visited the Chicken Kabob in the last 3 months. Frequency was highest among the *newer resident* and *income over $75,000* segments.

25% of respondents visited the Stoughton Baking Company in the last 3 months. Frequency was highest among the *within walking distance* segment.

The other restaurants were visited by less than 20% of the respondents in the last 3 months.

% of Respondents that Patronized Downtown Stoughton Restaurants in Last 3 Months



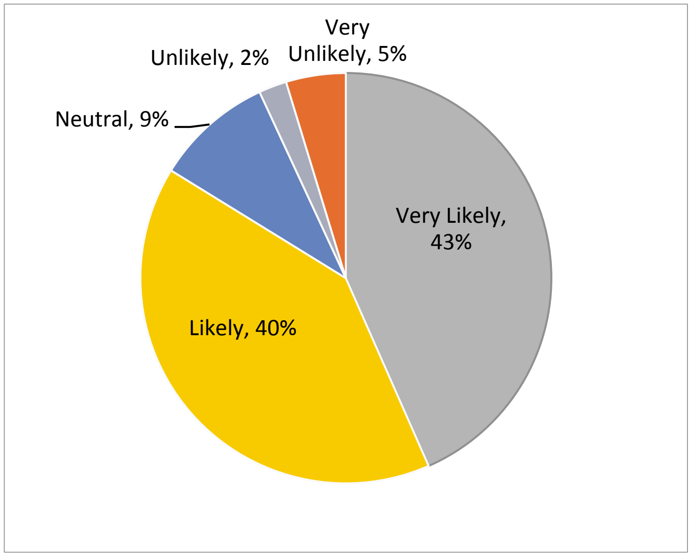
4.2 Stoughton Residents and Sub-Segments

4.2.2 Restaurant Preferences

Overwhelmingly, residents said they are likely to patronize new restaurants in Downtown Stoughton. **83% of Stoughton residents said they are "likely" or "very likely" to patronize new restaurants in Downtown.**

All of the sub-segments expressed similar or even more enthusiasm. The *new resident* and *millennial* segments indicated the highest support for new restaurants. **93% of the *newer resident* segment said they are "likely" or "very likely" to patronize new restaurants in Downtown.** In fact, 56% of the *newer resident* segment said they are "very likely". 89% of the *millennial* segment said they are "likely" or "very likely" to patronize new restaurants in Downtown.

Likelihood of Stoughton Residents Patronizing New Restaurants in Downtown Stoughton



Likelihood of Patronizing New Restaurants in Downtown Stoughton

	Stoughton Residents	Wi Walking Distance	Millennials (age 18-34)	Newer Residents ≤6 yrs.	HH Income ≥$75,000
Very Likely	43%	46%	46%	56%	47%
Likely	40%	39%	43%	37%	38%
Neutral	9%	8%	8%	4%	9%
Unlikely	2%	1%	1%	1%	2%

4.2.2 Restaurant Preferences (cont'd)

Residents are most likely to patronize new **Restaurants for Dinner**. 90% of the Stoughton resident respondents said they are "likely" or "very likely" to patronize new dinner restaurants.

Regarding specific types of restaurants, **Steak House** received the highest score concerning the likelihood of patronage, followed closely by **Diner, Family-Friendly, Fine Dining** and **Pub/Sports Bar**.

Among the *millennial* segment, **Pub/Sports Bar** received the highest score concerning the likelihood of patronage.

Among the *newer resident and household income over $75,000* segment, **Diner** received the highest score concerning the likelihood of patronage.

Likelihood of Patronizing New Restaurants in Downtown Stoughton by Meal Type

(% Respondents that indicated "Very Likely" or " Likely" to Patronize)

	Stoughton Residents	Wi Walking Distance	Millennials (age 18-34)	Newer Residents ≤6 yrs.	HH Income ≥ $75,000
Dinner	90%	91%	94%	95%	94%
Breakfast	70%	70%	71%	73%	70%
Lunch	68%	66%	69%	61%	67%

Likelihood of Patronizing New Restaurants in Downtown Stoughton by Specific Types

(% Respondents that indicated "Very Likely" or " Likely" to Patronize)

	Stoughton Residents	Wi Walking Distance	Millennials (age 18-34)	Newer Residents ≤6 yrs.	HH Income ≥ $75,000
Steak House	72%	72%	64%	71%	76%
Diner	70%	70%	70%	76%	79%
Family Friendly	70%	69%	69%	73%	70%
Fine Dining	69%	72%	53%	67%	72%
Pub/Sports Bar	69%	70%	77%	74%	75%
Seafood Restaurant	66%	64%	64%	69%	69%
Coffee Shop	55%	58%	65%	68%	55%
Ice Cream/ Frozen Yogurt	53%	52%	50%	61%	51%

4.2 Stoughton Residents and Sub-Segments

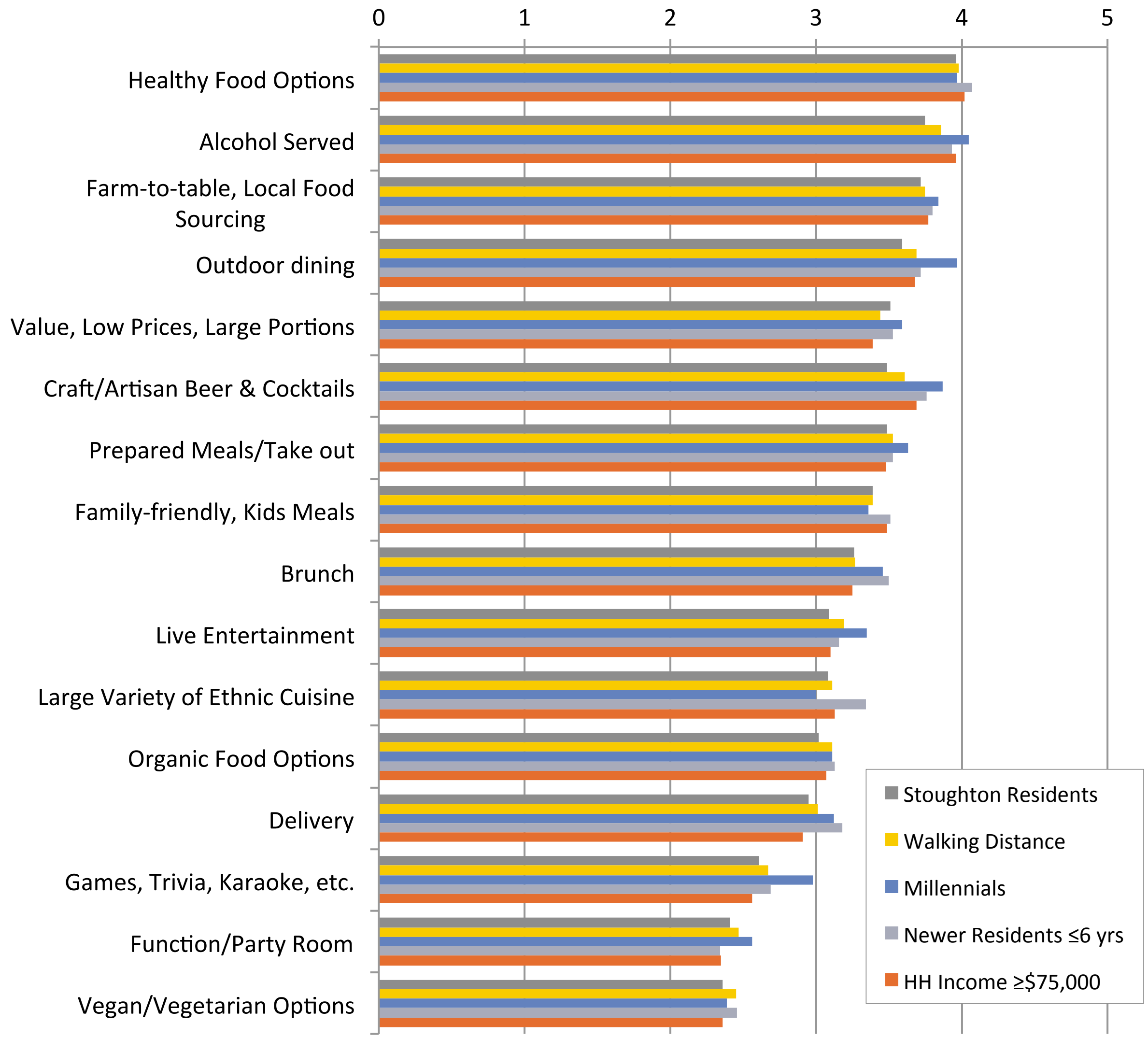
4.2.2 Restaurant Preferences (cont'd)

Stoughton residents identified **Healthy Food Options** as the most important characteristic for new restaurants. This was the most important attribute identified by all of the sub-segments except for the *millennial* segment which rated Alcohol as the most important characteristic.

Characteristics that received an average rating of 3.5 or above include:

1. Healthy Food Options
2. Alcohol Served
3. Farm-to-Table, Local Food Sourcing
4. Outdoor Dining
5. Value, Low Prices
6. Craft/Artisan Beer & Cocktails
7. Prepared Meals/Take out

Importance of Restaurant Characteristics (rated on scale of 1 to 5, with 1 being "Not at all Important" and 5 being "Very Important")



4.2 Stoughton Residents and Sub-Segments

4.2.2 Restaurant Preferences (cont'd)

Importance of Restaurant Characteristics (rated on scale of 1 to 5, with 1 being "Not at all Important" and 5 being "Very Important")

	Stoughton Residents	Wi Walking Distance	Millennials (age 18-34)	Newer Residents ≤6 yrs.	HH Income ≥ $75,000
Healthy Food Options	3.96	3.98	3.97	4.07	4.02
Alcohol Served	3.75	3.86	4.05	3.93	3.96
Farm-to-table, Local Food Sourcing	3.72	3.75	3.84	3.80	3.77
Outdoor dining	3.59	3.69	3.97	3.72	3.68
Value, Low Prices, Large Portions	3.51	3.44	3.59	3.53	3.39
Craft/Artisan Beer & Cocktails	3.49	3.61	3.87	3.76	3.69
Prepared Meals/ Take out	3.49	3.53	3.63	3.53	3.48
Family-friendly, Kids Meals	3.39	3.39	3.36	3.51	3.49

	Stoughton Residents	Wi Walking Distance	Millennials (age 18-34)	Newer Residents ≤6 yrs.	HH Income ≥ $75,000
Brunch	3.26	3.27	3.46	3.5	3.25
Live Entertainment	3.09	3.19	3.35	3.16	3.1
Large Variety of Ethnic Cuisine	3.08	3.11	3.00	3.34	3.13
Organic Food Options	3.02	3.11	3.11	3.13	3.07
Delivery	2.95	3.01	3.12	3.18	2.91
Games, Trivia, Karaoke, etc.	2.61	2.67	2.98	2.69	2.56
Function/Party Room	2.41	2.47	2.56	2.34	2.35
Vegan/Vegetarian Food	2.36	2.45	2.39	2.46	2.36

Importance of Restaurant Characteristics – Top 5 Rated by Sub-Segment

Stoughton Residents	Wi Walking Distance	Millennials (age 18-34)	Newer Residents ≤6 yrs.	HH Income ≥$75,000
Healthy Food Options	Healthy Food Options	Alcohol Served	Healthy Food Options	Healthy Food Options
Alcohol Served	Alcohol Served	Healthy Food Options	Alcohol Served	Alcohol Served
Farm-to-Table, Local Source	Farm-to-Table, Local Source	Outdoor Dining	Farm-to-Table, Local Source	Farm-to-Table, Local Source
Outdoor Dining	Outdoor Dining	Craft/Artisan Beer & Cocktails	Craft/Artisan Beer & Cocktails	Craft/Artisan Beer & Cocktails
Value, Low Prices	Craft/Artisan Beer, Cocktails	Farm-to-Table, Local Source	Outdoor Dining	Outdoor Dining

4.3 Downtown Employees

4.3.1 Restaurant Usage and Consumer Behavior

Downtown Stoughton employees go out for breakfast/coffee an average of 2.5 times per week, for lunch 2.1 times, and for dinner 1.6 times. While breakfast/coffee and lunch likely offers the most market opportunity for Downtown restaurants (on week days), employees may also select to stay in the area after work for dinner/drinks or purchase take-home meals.

40% of Downtown employees said they currently do less than 25% of their total restaurant spending in Stoughton.

Frequency of Meals Purchased at Restaurants

(Avg. times per Week)

	Downtown Employees
Breakfast/Coffee	2.47
Lunch	2.06
Dinner	1.63
Total	6.16

% of Restaurant Spending done in Stoughton

	Downtown Employees
25% or Less	40%
26 - 50%	29%
51 - 74%	23%
75% - 100%	9%

One third of Downtown Stoughton employees (33%) go out for dinner at a fast casual restaurant once per week or more, 39% go out for dinner at a casual dining establishment once per week or more**.**

Frequency of <u>DINNER</u> Meals Purchased at Various Restaurant Types – Downtown Employees

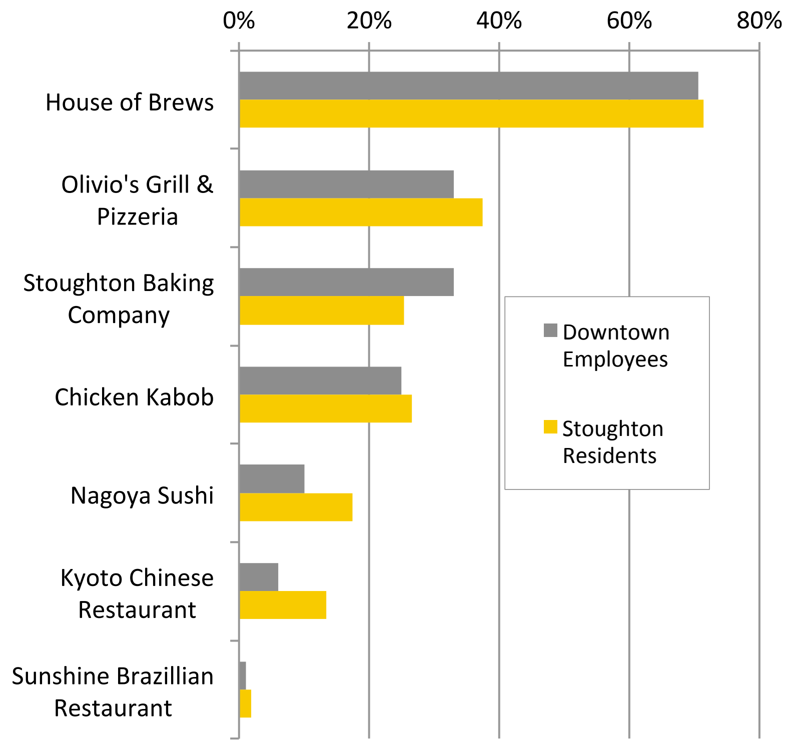
	≥ 2 Times/ Week	Once/ Week	2-3 Times/ Month	Once/ Month	< Once/ Month
Quick Service (typically <$7 per person, Comparable to McDonald's, Wendy's, Starbucks, etc.)	13%	11%	13%	17%	46%
Fast Casual (typically $7 - $10 per person, Comparable to Panera Bread, Chipotle, Five Guys, etc.)	17%	16%	22%	21%	25%
Casual Dining (typically $10 - $18 per person, Comparable to Olive Garden, Chili's, Outback Steakhouse, etc.)	9%	30%	31%	14%	16%
Fine Dining (entrees>$18, Comparable to Legal Seafood, Amelia's, etc.)	4%	13%	14%	28%	40%

4.3 Downtown Employees

4.3.1 Restaurant Usage and Consumer Behavior

The House of Brews is the most frequently visited establishment among Downtown employees, followed by Olivio's Grill & Pizzeria and Stoughton Baking Company.

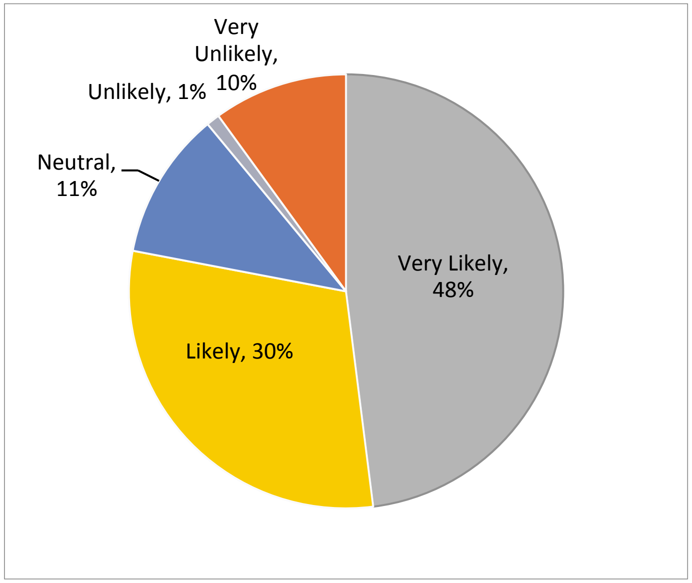
% of Respondents that Patronized Downtown Stoughton Restaurants in Last 3 Months



4.3.2 Restaurant Preferences

Overwhelmingly, Downtown employees said they are likely to patronize new restaurants in Downtown Stoughton. **78% of said they are "likely" or "very likely" to patronize new restaurants in Downtown.**

Likelihood of Downtown Employees Patronizing New Restaurants in Downtown Stoughton



4.3 Downtown Employees

4.3.2 Restaurant Preferences (cont'd)

Downtown employees are most likely to patronize new **Restaurants for Lunch**. 87% of the Stoughton employee respondents said they are "likely" or "very likely" to patronize new lunch restaurants.

Regarding specific types of restaurants, **Steak House** received the highest score concerning the likelihood of patronage, followed closely by **Pub/Sports Bar, Seafood Restaurant, and Diner.**

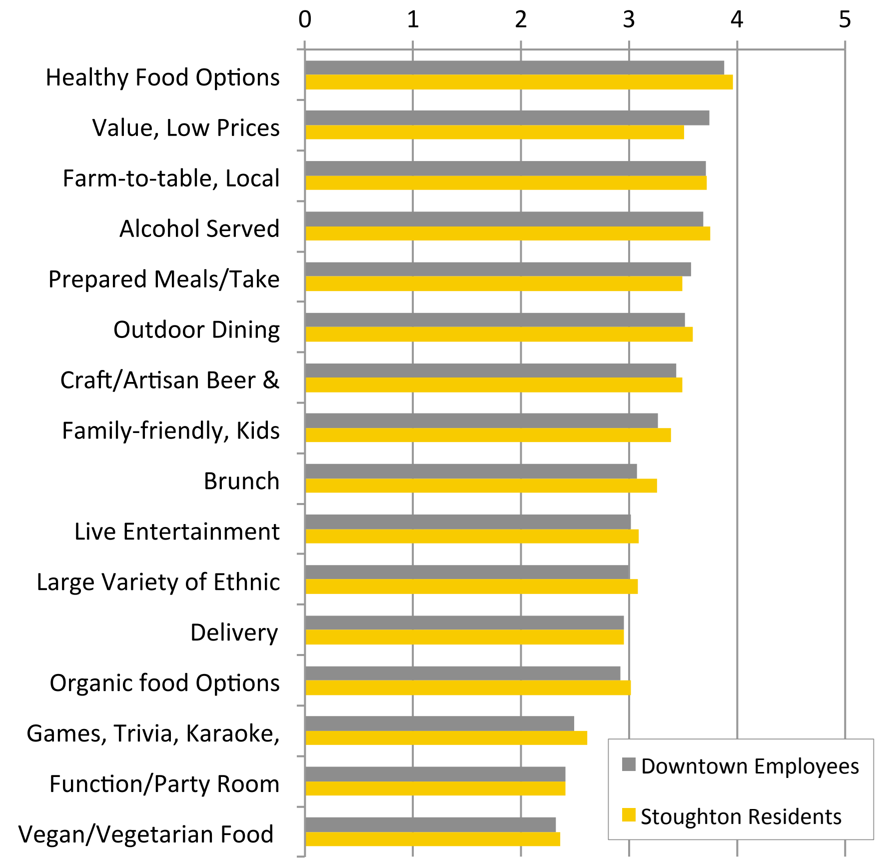
Likelihood of Patronizing New Restaurants in Downtown Stoughton by Meal Type & Specific Types
(% Respondents that indicated "Very Likely" or " Likely" to Patronize)

	Downtown Employees
Lunch	87%
Dinner	83%
Breakfast	65%

	Downtown Employees
Steak House	72%
Pub/Sports Bar	75%
Seafood Restaurant	74%
Diner	71%
Family Friendly	65%
Fine Dining	63%
Coffee Shop	56%
Ice Cream/Frozen Yogurt	49%

Downtown employees identified **Healthy Food Options** as the most important characteristic for new restaurants.

Importance of Restaurant Characteristics (rated on scale of 1 to 5, with 1 being "Not at all Important" and 5 being "Very Important")



4.4 Commuter Train Users

4.4.1 Restaurant Usage and Consumer Behavior

Commuter train users go out for breakfast/coffee an average of 2.2 times per week, for lunch 1.8 times, and for dinner 1.7 times (slightly higher frequency than Stoughton residents). While breakfast/coffee likely offers the most market opportunity for Downtown restaurants, employees may also select to stay in the area after retuning home on the train for dinner/drinks or purchase take-home meals.

More than half (52%) of commuter train users said they currently do less than 25% of their total restaurant spending in Stoughton.

Frequency of Meals Purchased at Restaurants

(Avg. times per Week)

	Train Users
Breakfast/Coffee	2.16
Lunch	1.80
Dinner	1.74
Total	5.71

% of Restaurant Spending done in Stoughton

	Train Users
25% or Less	52%
26 - 50%	32%
51 - 74%	11%
75% - 100%	5%

One-quarter of commuter train users (25%) go out for dinner at a fast casual restaurant once per week or more, 33% go out for dinner at a casual dining establishment once per week or more.

Frequency of DINNER Meals Purchased at Various Restaurant Types – Train Users

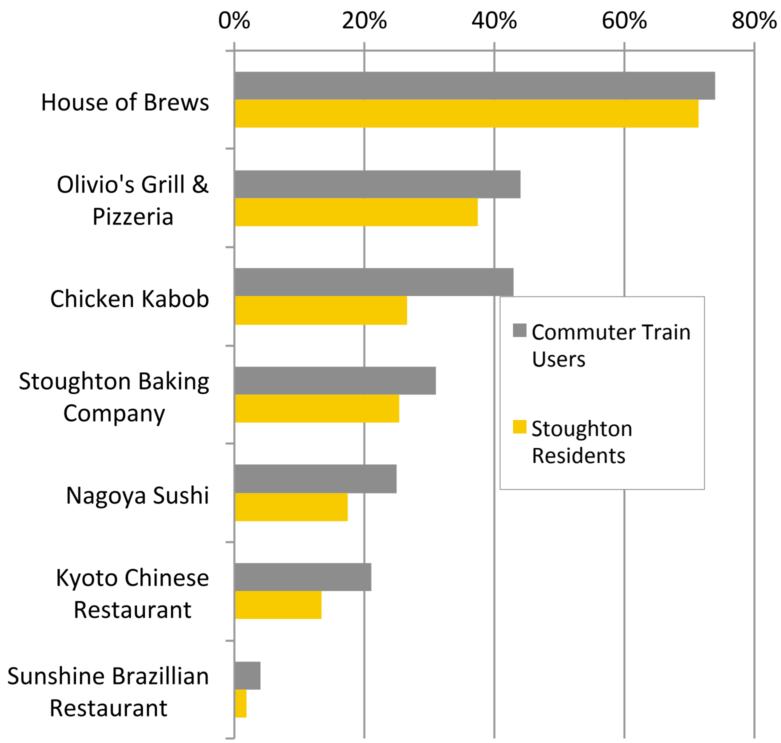
	≥ 2 Times/ Week	Once/ Week	2-3 Times/ Month	Once/ Month	< Once/ Month
Quick Service (typically <$7 per person, Comparable to McDonald's, Wendy's, Starbucks, etc.)	12%	13%	9%	13%	53%
Fast Casual (typically $7 - $10 per person, Comparable to Panera Bread, Chipotle, Five Guys, etc.)	11%	14%	21%	20%	33%
Casual Dining (typically $10 - $18 per person, Comparable to Olive Garden, Chili's, Outback Steakhouse, etc.)	14%	19%	23%	16%	29%
Fine Dining (entrees>$18, Comparable to Legal Seafood, Amelia's, etc.)	6%	9%	20%	17%	48%

4.4 Commuter Train Users

4.4.1 Restaurant Usage and Consumer Behavior

The House of Brews is the most frequently visited establishment among commuters, followed by Olivio's Grill & Pizzeria and Chicken Kabob.

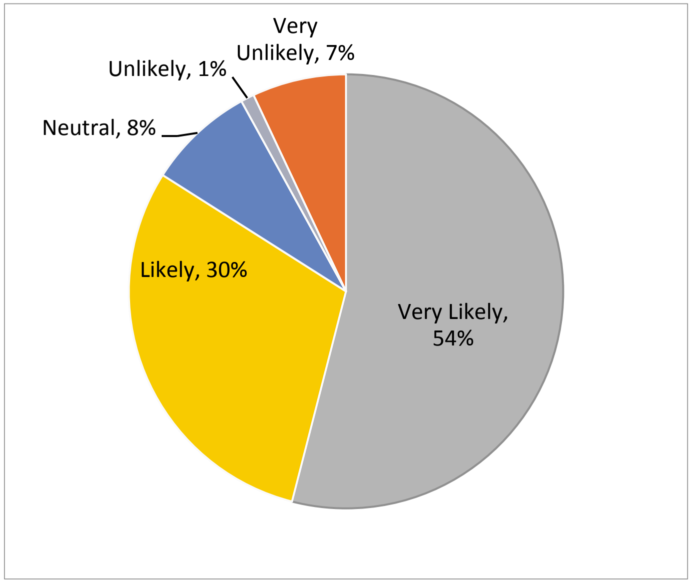
% of Respondents that Patronized Downtown Stoughton Restaurants in Last 3 Months



4.4.2 Restaurant Preferences

Overwhelmingly, the commuter train users said they are likely to patronize new restaurants in Downtown Stoughton. **84% of said they are "likely" or "very likely" to patronize new restaurants in Downtown.**

Likelihood of Commuter Train Users Patronizing New Restaurants in Downtown Stoughton



4.4.2 Restaurant Preferences (cont'd)

Commuter train users are most likely to patronize new **Restaurants for Dinner**. 96% of the commuter respondents said they are "likely" or "very likely" to patronize new dinner restaurants.

Regarding specific types of restaurants, **Fine Dining** received the highest score concerning the likelihood of patronage, followed closely by **Pub/Sports Bar and Seafood Restaurant**

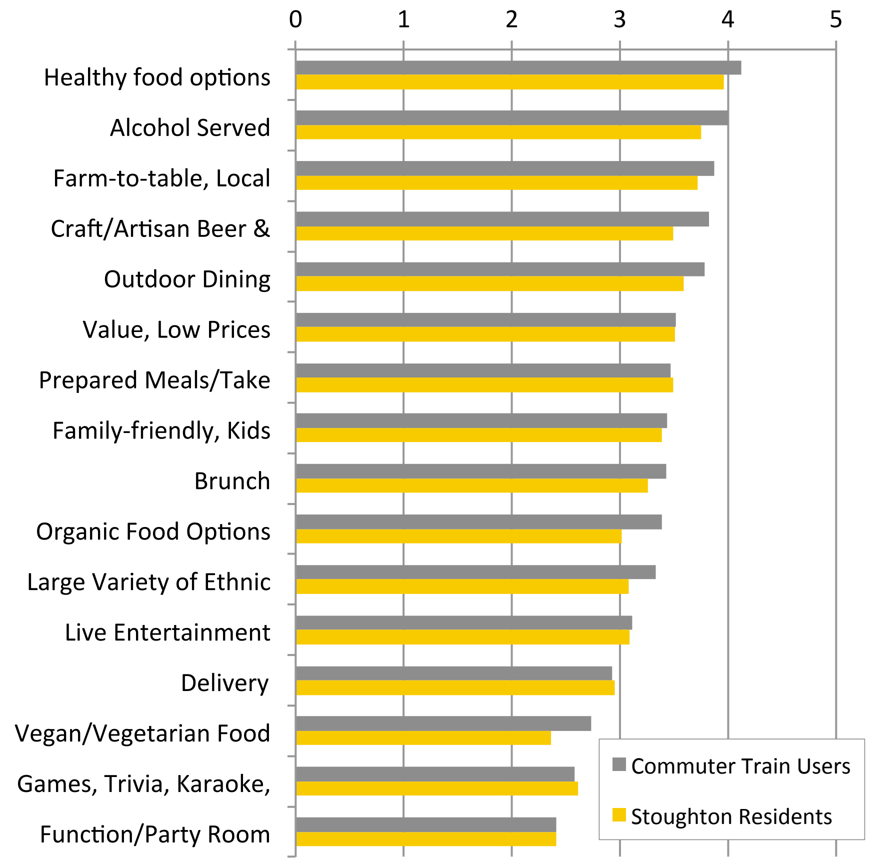
Likelihood of Patronizing New Restaurants in Downtown Stoughton by Meal Type & Specific Types
(% Respondents that indicated "Very Likely" or " Likely" to Patronize)

	Commuters
Dinner	96%
Breakfast	73%
Lunch	62%

	Commuters
Fine Dining	74%
Pub/Sports Bar	74%
Seafood Restaurant	72%
Family Friendly	69%
Steak House	67%
Coffee Shop	66%
Diner	65%
Ice Cream/Frozen Yogurt	59%

Commuter train users identified **Healthy Food Options** as the most important characteristic for new restaurants.

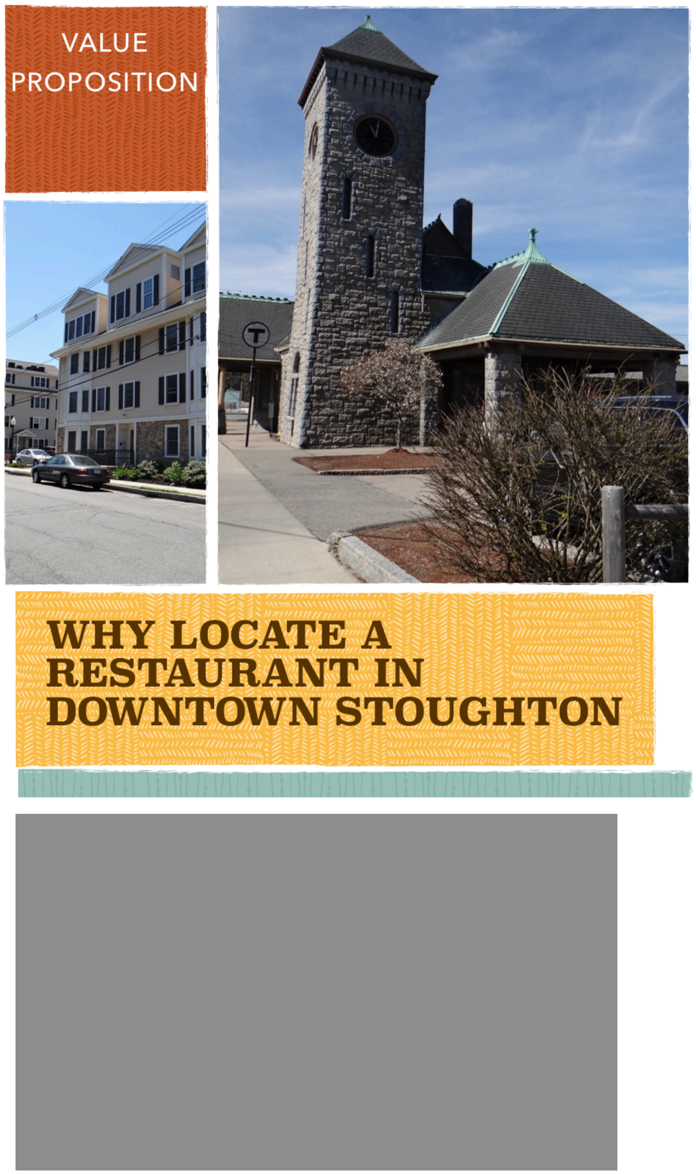
Importance of Restaurant Characteristics (rated on scale of 1 to 5, with 1 being "Not at all Important" and 5 being "Very Important")



4.5 Additional Survey Comments

Many survey respondents added additional comments.
Recurring topics are summarized below.

- Around 10% of the respondents mentioned parking as an issue. (*The office of Economic Development has recently applied for funding to develop a parking management plan for Downtown*.)
- Many respondents reiterated the preference for healthy, veggie-centric, fresh, farm-to-table type of food offerings.
- Many respondents expressed the preference for no additional fast food, pizza/subs or Chinese/Asian food.
- Several respondents mentioned they would like to see more restaurants similar to House of Brews in atmosphere and quality.
- Several respondents mentioned they would like to see a Mexican restaurant in Downtown. *(Avocados, a Mexican restaurant is planning to open in Downtown soon.)*
- Several respondents mentioned they would like to see a restaurant in Downtown similar to Farmers Daughter (in Easton).



Part Five

Summary of Findings that Can be Used in Restaurant Recruitment

Value Proposition: Why Locate a Restaurant in Downtown Stoughton

The Location . . .

- **Liquor licenses** designated for the Downtown are available.
- There are many well-positioned **sites available** in Downtown.
- **Safe** walkable downtown, **easily accessible for local and regional customers.**
- **There is a burgeoning restaurant cluster in downtown.** Several new restaurants have opened in the last 5 years including a gourmet coffee shop/craft beer entertainment café. All of the Downtown restaurants interviewed reported growth over the last 3 years.
- **The cost of occupancy in this up and coming Downtown is competitive with surrounding communities** and much less than Boston neighborhoods, the reason that at least one recent business startup decided to make their home in Stoughton.
- Recent and planned housing development is bringing **many new young professionals to live in Downtown**. Over 100 housing units targeted to young professionals taking advantage of the commuter train to Boston have recently been developed or are underway.
- The Friends of **State Theatre** are currently raising funds to renovate the 12,000 square foot historic vaudeville theater for **a multicultural arts center**.

The Market . . .

- There are **33,700 residents living within a 5-minute drive time** from Downtown Stoughton. The median **household income is 19% higher than Massachusetts**.
- It is a growing market; the trade area population is expected to grow at a higher rate than the State overall.
- Residents within the 5-minute trade area **spend close to $64 million per year at restaurants.**
- Over **126,ooo residents live within a 10-minute drive time** and spend close to $228 million per year at restaurants.
- There is indication of **demand for more upscale offerings.**
- **Over 500 employees** work in the downtown area, the hub of town government.
- **The commuter train brings many potential customers into downtown;** over 1,000 people board the train at Stoughton on a typical weekday.

Value Proposition: Why Locate a Restaurant in Downtown Stoughton

Recent Survey Results . . .

A survey of over 600 trade area residents and downtown employees indicated consumer demand and preference for new restaurants.

- **Residents want new restaurants in Downtown Stoughton** … 83% said they were "likely" or "very likely" to patronize new restaurants. The millennial sub-segment and newer sub-segment are even more enthusiastic about new restaurants.
- **Survey results indicate unmet demand** …43% of residents said they currently spend ≤ 25% of there restaurant total spending in the town of Stoughton.
- **There appears to be a gap in higher end restaurant offerings** … 54% of resident respondents indicated they go to a fine dining/higher end restaurant (entrées over $18) once per month or more, however, there is currently only one restaurant in Stoughton that fits that description.
- Characteristics of new restaurants that rated most important by residents include: **Healthy** Food Options**, Alcohol** Served, **Farm-to-Table**/Local Food Sourcing, **Outdoor Dining**, **Value**, **Craft/Artisan Beer & Cocktails**, and **Prepared Meals/Take out**.

- Residents indicated they would be most likely to patronize new restaurants for dinner (90%) and they currently go out to dinner an average of 1.7 times per week. However, over 60% also said they would patronize new restaurants for breakfast or lunch.
- **Steak House** received the highest score for likelihood of patronage, followed closely by **Diner, Family-Friendly, Fine Dining** and **Pub/Sports Bar**. The millennial market segment rated Pub/Sports Bar the highest while residents within walking distance rated fine dining tied with steak house as the highest.
- On average, the Stoughton Downtown employees go out for breakfast/coffee an average of 2.5 times per week and 2.1 times per week for lunch.
- 78% of Downtown employees said they are "likely" or "very likely" to patronize new restaurants in Downtown. Healthy Food Options, Value/Low Prices and Farm-to-Table/Local Food Sourcing were rated as important characteristics by Downtown employees.

Value Proposition: Why Locate a Restaurant in Downtown Stoughton

Support for New Restaurants . . .

- Stoughton is very **committed to maintaining vibrancy** in the downtown with a dedicated Office of Economic Development and an active citizen group, Friends of Stoughton Center.
- Development of the Downtown is the number one priority cited in the Town-completed master plan.
- The recently developed Stoughton Business & Permitting Guide provides the information that business and property owners need to know and facilitates **expedited permitting**.